

SharePoint Online, Office 365 and OneDrive at Ottawa Community Housing (OCH)



A CASE STUDY IN MUNICIPAL HOUSING

Ottawa Community Housing is an innovative sector leader with a strategic goal to seek continuous improvement in providing affordable housing. OCH houses a diverse population of varying languages, ethnicity and culture. OCH is the largest social housing provider in Ottawa, managing two-thirds of the City's social housing portfolio, and is the second largest community housing service in Ontario. Today, OCH is responsible for nearly 15,000 housing units spread over 162 communities within the city.

In assessing their need for better document and records management and collaboration, OCH initially conducted focus group sessions with senior management and users that were followed up with interviews and a review of relevant documents. Based on this research, several key areas were identified as critical to improving the exchange of information within the company and also to external stakeholders.

Document and Records Management

Documents from many business disciplines need to be managed - Finance, Legal, Tenant Services and Human Resources information needs to be managed in a consistent and reliable way. Documents have a natural lifecycle from creation to disposition. Current documents need to be accessible, protected, relevant and reliable; when they are no longer current, documents need to be archived and ultimately deleted.

Collaboration

Also closely linked to better document and records management, is the ability to share information across and between internal users. OCH recognized the need to facilitate and improve knowledge exchanges and develop better processes for internal document collaboration.

For internal collaboration and the intranet, users needed centralized access to corporate documents; a way to post news and announcements; a place to post policies, procedures, best practices, FAQs, etc.; access to a central schedule; and tools for idea gathering and discussions.

Search

Better document searching capability was a high priority for staff. Users identified that searches should support finding information regardless of its format and storage location. Users wanted the ability for both specific search abilities (e.g., when you are looking for a particular document) and also more global, non-specific searches (e.g., when you want to see documents of a particular type).

SOLUTIONS OVERVIEW

Customer Profile

Headquartered in Ottawa, **Ottawa Community Housing (OCH)** is an innovative sector leader and provides approximately 15,000 homes to 32,000 tenants, including seniors, parents, children, couples, singles and persons with special needs, within many communities across the City of Ottawa. OCH houses a diverse population of varying languages, ethnicity and cultures. OCH is the largest social housing provider in Ottawa, managing two-thirds of the City's social housing portfolio, and is the second largest in Ontario.

Business Situation

Without a central solution for managing their documents and records, information was difficult to find, collaboration was limited and records management was inconsistent. OCH needed a common Cloud-based platform that was to use and easy to manage.

Solution

Utilizing Microsoft's cloud-based products, HELUX architected and developed a cloud-based SharePoint Online, Office 365 and OneDrive for Business solution. OCH uses HELUX's powerful THEMIS IIM Suite to build their information architecture and to manage their records

Benefits

- Improved central administration of information.
- Improved document management and collaboration for internal users.
- Able to manage the document lifecycle.
- Improved findability of information.

Software and Services

- SharePoint Online
- OneDrive for Business
- Office 365
- Azure
- THEMIS IIM Suite

Partners

HELUX

SOLUTION

In November 2016, OCH turned to Microsoft Gold Certified Partner, HELUX, for help. OCH had procured Microsoft's SharePoint product but the implementation was in its initial stage and they required expert help in establishing an information management program to design, build, configure and implement an intranet and records management system using SharePoint Online and Office365. Starting with the gathering of user requirements, major blocks of functionality were planned, developed and deployed in successive phases and refined with end-user feedback. The end result is a new intranet portal that allows users to access all the organization's key enterprise systems in one place. Some of the major milestones in the project included:

- Planning the information architecture and improving organizational processes for collaboration and document management.
- Creation of a new intranet, corporate homepage and standardized corporate records management processes using SharePoint Online.
- The use of SharePoint Online has allowed OCH to improve in acquiring, sharing, collaborating, searching, coordinating, protecting and managing the lifecycle of corporate information.
- Replacement and migration of shared drives to SharePoint Online for a single structured and collaborative approach to document and records management throughout the organization.
- SharePoint Online now serves as the organization's primary centralized records management and information sharing tool for the OCH workforce of approximately 400 employees.
- The solution is cross platform compatible to accommodate a variety of devices and OCH's mobile workforce.

BUSINESS BENEFITS

Using a SharePoint Online and Office365 solution has allowed OCH to deliver on its objective of producing a collaboration and document management platform that enables internal users to have better access to the information they need, when they need it, while also making it easier for central administrators to manage the content in a consistent and definable way.

Centralized Administration

With SharePoint Online and Office365, OCH is able to centralize the user interface and ensure a consistent user experience. This allows OCH administrators to centrally manage the information using Azure technologies and provide the users with a consistent browsing experience.

Improved Collaboration

OCH's new intranet is a portal that allows employees to access all the organization's key enterprise systems (finance and housing management) in one central location. Document libraries with security trimming and relevant metadata allow the employees to easily find and share information with other users in the organization.

Managing the Document Lifecycle

OCH has now introduced new practices for managing documents in the organization. Costly duplication of documents and information has been greatly reduced and using version control has ensured that users can be confident they are looking at the latest version of a document. Additionally, OCH now has a modern and efficient records management system to effectively manage the lifecycle of its information assets.

Improved Findability

The user is now able to navigate or search across sites and document libraries to find the information they need quickly and easily. By applying metadata to the information, HELUX has provided a way for OCH to fine-tune the search criteria so that users can say to the search engine, "I need all the information created by this *author* between the *dates* of January 1, 2018 and August 31, 2018 with the word *tenant* in the *title*". This level of findability ensures that the user can get a minimum number of returns and a maximum chance of finding the correct information.

For more information

Microsoft is the world's leading provider of solutions for Digital Transformation including Cloud technologies, document and records management and collaboration. For more information about Microsoft, go to www.microsoft.com

HELUX is a leading solutions provider for SharePoint technologies. For more information about HELUX products and services, call (613) 291-2683 or visit the website at www.heluxsystems.com